

Provo City School District
Policy Series 6000 Finances and Operations

6210 F4

SOLE SOURCE JUSTIFICATION FORM

Note: This Word document is designed to allow the requestor to provide as much information as needed. Please click on the gray fields to insert the information. Use the tab key to advance to the next field. Please complete all fields below. Requests missing information will be rejected and returned to requestor for completion.

This request must be approved by Purchasing prior to placing an order (if the purchase is over \$500). Allow enough time for bidding should this request be denied. In cases of reasonable doubt, competition will be solicited. If this request is for a purchase exceeding \$50,000 it will be posted publicly, inviting comments for a minimum of five working days and it will also require approval of the Board of Education.

Sole Source Procurement is an option if a purchase requirement is reasonably available from a single supplier only or if it otherwise qualifies under Provo School District policy (see Purchasing Policy 6210). Attach this completed form to a copy of the Requisition or fax or e-mail to the Purchasing Department.

Requesting School or Department:

Requisition Number:

Contact Person and Title:

E-mail Address:

Phone Number:

Product / Service to be purchased:

[Give a full, complete description here and list specifications of goods or “Scope of Work” for services to be purchased]

Cost (include renewal periods if any):

Recommended Supplier/Contractor:

Supplier Contract Person:

Supplier E-mail Address:

Supplier Phone Number:

Supplier Address including zip code:

The Sole source request is based on which of the following (check all that apply):

- Compatibility of equipment or services (complete sections A and B, below).
- Trial or Testing (complete section C, below).
- The equipment or service is only available from a single supplier in the U.S. (complete section A, below).
- Compatibility and consistency of professional services (complete section A, below).

Section A. GENERAL INFORMATION

- 1. What is unique about this product or service to justify a sole source?
- 2. Could the product or service be reasonable modified to allow for competition?
- 3. Explain the market research you performed to make this sole source recommendation?
- 4. List the names of suppliers you contacted, their contact person and a summary of their response?
- 5. Disclosure must be included with this request if the requestor has any personal, financial or fiduciary relationship with the recommended supplier.

Section B. COMPATIBILITY OF EQUIPMENT/SERVICE

- 1. Describe the existing equipment that this purchase must be compatible with, the original purchase price and date of purchase.
- 2. What is the remaining life expectancy of the existing equipment?
- 3. What procurement method was used to purchase the existing equipment (Bid, RFP or Sole Source)?
Provide the solicitation number, or the sole source number:

Section C. TRIAL OR TESTING

- 1. Why is the trial or testing necessary?
- 2. What is the anticipated end result of the trial or test?
- 3. Do any other suppliers provide this product or service?
 - a. If yes, list the company names:
 - b. Will their products be tested?
- 4. What criteria were used to choose this supplier?
- 5. What is the size or scope and location of test or trial?

Requested by:

Approved:

Agency Signature _____ Date _____

Purchasing Department _____ Date _____

Title:

NOTE: If submitted by e-mail, type the requestors' name on the signature line. Electronic submittal constitutes implied signature by requestor.

PART 3 – SOURCE SELECTION AND CONTRACT FORMATION

Subpart 3-3 – Sole Source Procurement

3-301 Conditions For Use of Sole Source Procurement. (Utah State Code #63-56-23)

Sole Source procurement shall be used only if a requirement is reasonably available from a single supplier. A requirement for a particular proprietary item does not justify a sole source procurement if there is more than one potential bidder or offeror for that item or service.

The determination as to whether a procurement shall be made as a sole source shall be made by the procurement officer. Each request shall be submitted in writing by the using agency. Such officer may specify the application of such determination and its duration. In cases of reasonable doubt, competition should be solicited. Any request by using agency that a procurement be restricted to one potential contractor shall be accompanied by an explanation as to why no other will be suitable or acceptable to meet the need.